

**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Thursday, September 9, 2021**

Designated Federal Officer (DFO)

- Cedric Jeans Designated Federal Officer

Attendance

- | | | |
|-------------------------|-------------------|-----------------|
| • Michael Avery | San Juan, PR | Member |
| • Laurie Brock | Eugene, OR | Chair |
| • Gina Gray | Nichols Hills, OK | Member (Absent) |
| • Ryan Groff | Beverly, MA | Vice-Chair |
| • Dorothy Havey | Belfast, ME | Member (Absent) |
| • John Hughes | Memphis, TN | Member |
| • Matthew "Matt" Kinley | Long Beach, CA | Member |
| • Robert "Bob" Moretti | Great Falls, MT | National Chair |
| • Brandon Smith | Bowie, MD | Member (Absent) |
| • Laura Snyder | Paris, France | Member |
| • William "Bill" Vetter | Cypress, TX | Member (Absent) |

Staff

- | | |
|--------------------------|--|
| • Kevin Brown | Administrative Assistant |
| • Fred Smith | TAP Program Analyst |
| • Antoinette "Toni" Ross | TAP Program Analyst |
| • Fred Smith | TAP Program Analyst |
| • Debra "Debbie" Awalt | Program Analyst, Wage & Investment (W&I) |
| • James Bellinger IV | Program Analyst W&I |

Welcome Announcements/Comments/Acknowledgements

Cedric Jeans welcomed all attendees and opened the meeting at 11:00am ET.

Roll Call

Quorum was met.

Members of the Public

None

Chair Report

Brock welcomed everyone to the call and noted we have a full agenda.

National Office Report/ DFO Report

Jeans reported that during the Joint Committee (JC) Planning session there was an action plan developed to address some of the challenges raised during meeting. Completing Activity Reports was one issue raised, to which the staff is working to incorporate this report into www.tapspace.org to make it easier for the members to complete and turn in. This is an ongoing project that we hope to have completed before the next TAP year.

Other challenges included sharing examples of virtual outreach on www.tapspace.org to give other members ideas on how to conduct outreach in this fashion. We are also looking to give more training for chairs and vice-chairs to better prepare them to do their jobs. The National Chair/Vice-chair election process for TAP starts this month. We are encouraging returning members to participate in TAP leadership for next year.

We are working on training for both the National Chair and Vice-Chair to get them familiar with our modified form of Robert's Rules of Order. The Facebook group is being converted to a page. Go to the new page and like the page since it is going away soon.

Minutes Approval

August 12, 2021 minutes- Snyder motioned; Hughes seconded.

Action: Minutes approved as submitted

Outreach Report

Groff reported receiving most of the activity reports and reminded the members how important they are as they show the IRS the work we are doing. They also help determine the presidential awards calculations. Please turn in the reports if you have them. Send any snippets for the newsletter to Groff. Groff also asked the committee to send any outreach you think is interesting to share with TAP.

Brock reminded the committee the TAP has an Instagram account. Please go in and join the account. Brock will conduct an outreach event next week for about 150 during a tax training program.

Chair Report Out

- Annual Report

Brock explained the report, which shows all the TAP work for the year, who is going to read it and how important it is. Brock is requesting input from the committee to complete this task. To do so, she will email each member a list of tasks to select from for this project. We will separate the work into three sections: adopted referrals; active referrals awaiting a response; and rejected referrals.

As an example, Brock spoke about **Issue 42967**-Simplified Reporting for Overseas Taxpayers. This was Non-adopted will be included in the Annual Report in detail explaining the importance of this referral and the impact on international taxpayers.

Subcommittee 1 Report out

Moretti reported on **Issue 48702**-Ensure Taxpayer Security When Using the IRS Free File Program. This issue was pulled back from the Joint Committee (JC) due to extensive comments requiring more research. A Subject Matter Expert (SME) was requested, and detailed research was done. This referral seeks better security and for there to be an option for Free File directly through the IRS. Bradford Folta, Notices and Correspondence Committee assisted us in this project. The referral also seeks to show that any taxpayer can use the Free File fillable forms.

Brock reported how it was received the first time at the JC. This referral is much more complete and better researched. This clearly speaks about Free File fillable forms and the security issues. Moretti motioned; Snyder seconded.

Action: Issue elevated to the JC for consideration, pending Quality Review (QR)

Subcommittee 2 Report Out

Brock reported:

Project Referrals:

- Proposal for **Issue 48660**-Why Be in Debt to Use Online Services

Dropping as this issue is being addressed in the online accounts issue which focuses on granting overseas taxpayers' access via online services. Snyder raised an inquiry about whether this specific issue is being addressed in the online account services referral. The committee will review this to ensure it is being resolved.

- Referral for **Issue 49802**-Refund Payments Regarding Divorced Taxpayers

This issue show concern regarding one check sent out to married, divorced, or separated taxpayers. The subcommittee will work to see separate checks issued to avoid delays couples receiving such payments. This issue is being worked.

Roundtable

Avery congratulated Brock for staying on top and being engaged with issues and leading this committee. Avery inquired about whether we can accelerate overseas taxpayer issues, maybe from a Director level from the International department in IRS. A possible forum or focus group could be an option as working with LB&I. The TAP staff can raise this point during the next liaison meeting. Jeans spoke about the procedures and how we have been asked to

present such issues by the IRS. This also allows a way to track these issues and for TAP to get the credit when such issues are resolved.

Moretti spoke about several approaches the IRS is taking to resolve issues like this. The Taxpayer First Act (TFA) office, run by Kenneth Corbin, is taking some of these issues on also. Moretti is certain the IRS will work with us to figure out ways to address these sorts of issues.

Brock reported **Issue 48551** accepted by the JC during the last meeting but now the issue has been broken into nine separate recommendations.

Action Items

Antoinette Ross will do the following:

- Submit August 2021 minutes to post to www.improveirs.org.
- **Issue 48702** elevated to JC pending QR.
- Reconsider or park **Issue 48660**.
- Raise awareness for more focus groups or forums with LB&I- ongoing action item for TAP staff.
- **Issue 49802** will be reviewed to ensure online account referral resolves it.
- Snyder requested a copy of **Issue 48551**.

Closing

Brock and Groff thanked everyone for running the meeting. Jeans closed the meeting at 11:55pm ET

Next Meeting: Thursday, October 14, 2021 at 11:00am ET

These minutes have been approved and certified by the committee chairperson.